

The Bay Area EV Market

San Mateo County Perspective

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Bay Area Air Quality Management District





Bay Area Air Quality Management District

- Established in 1955
- 9 Counties
- 7+ million people
- Governing Board of 24 elected officials
- Mission: protect human health and combat global climate change

BAY AREA

ELECTRIC VEHICLE TRENDS AND GOALS



9,481 public charging ports currently

25,000 public charging ports needed (NREL)

In 2019 3.4% of the cars are EVs, with a goal of 90% by 2050

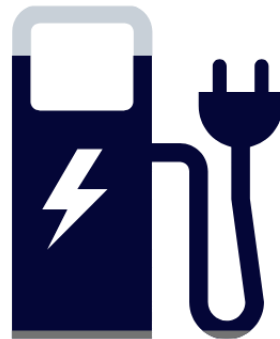


Public charging ports

16% DC Fast

83% Level 2

1% Level 1



Progress towards our EV Adoption Goals

2019: 197,880



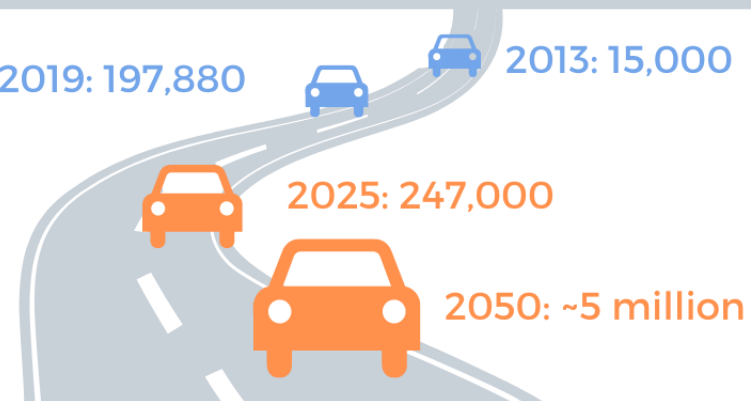
2013: 15,000



2025: 247,000



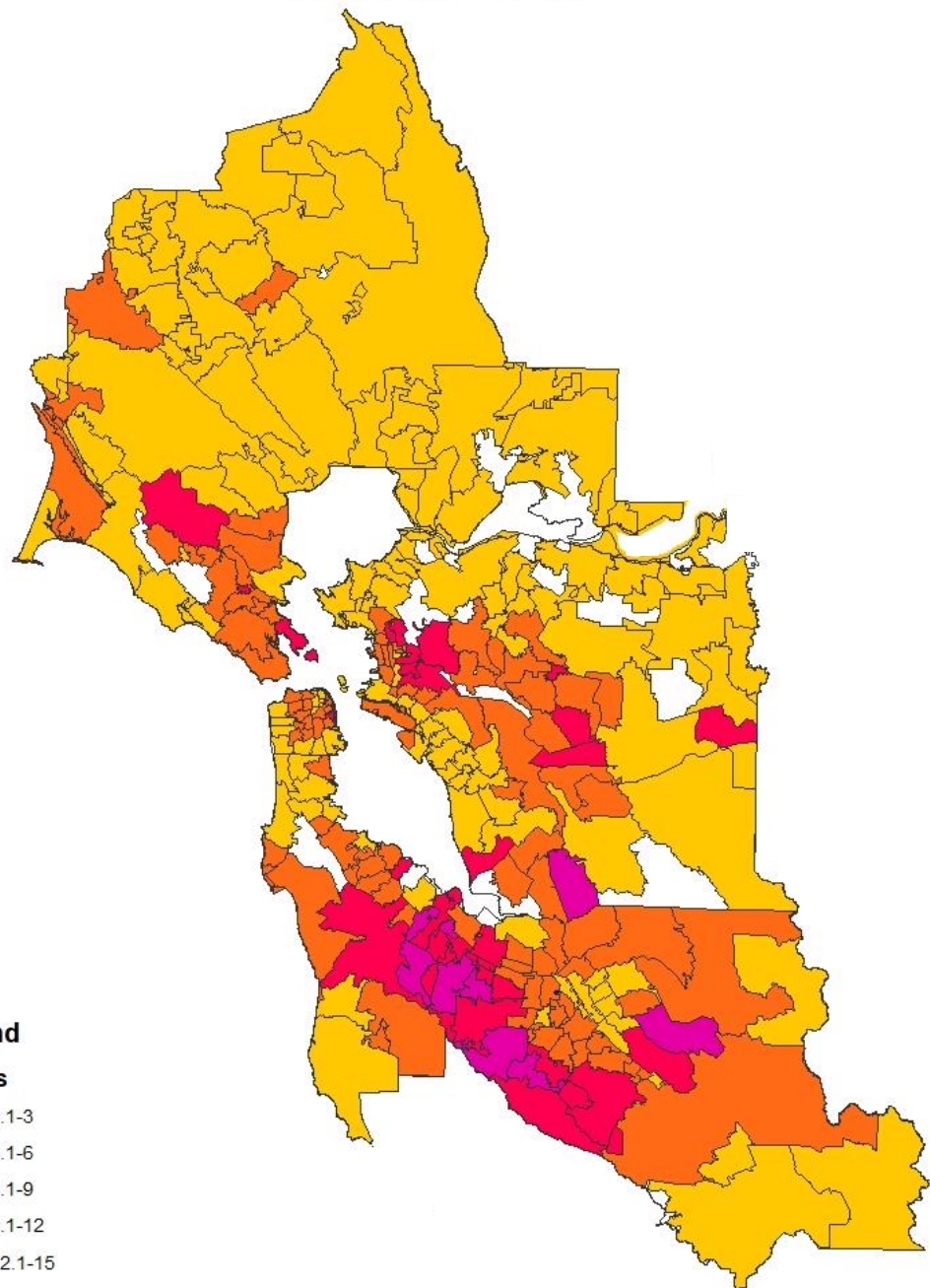
2050: ~5 million



Registered Electric Vehicles (EVs)

	Bay Area EVs	San Mateo County EVs
BEV	122,277	15,510
PHEV	73,533	7,034
FCEV	2,070	166
TOTAL	197,880	22,710

Percent EV's of Total Vehicle Population
DMV Data - 2019

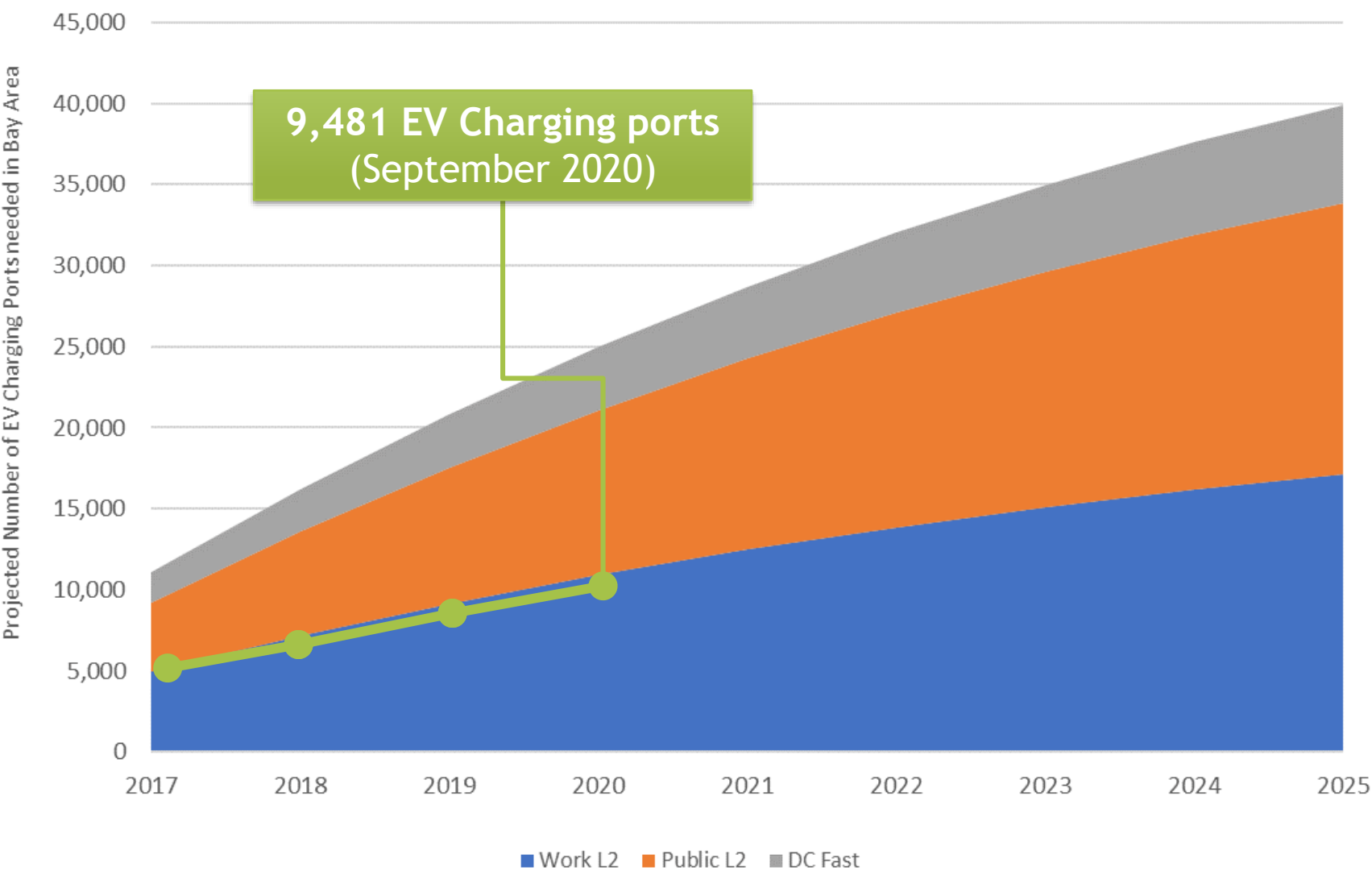


EV Market Share by Zip Code

In 79% of Bay Area
zip codes EVs make
up 5% or less of the
overall registered
vehicle fleet.

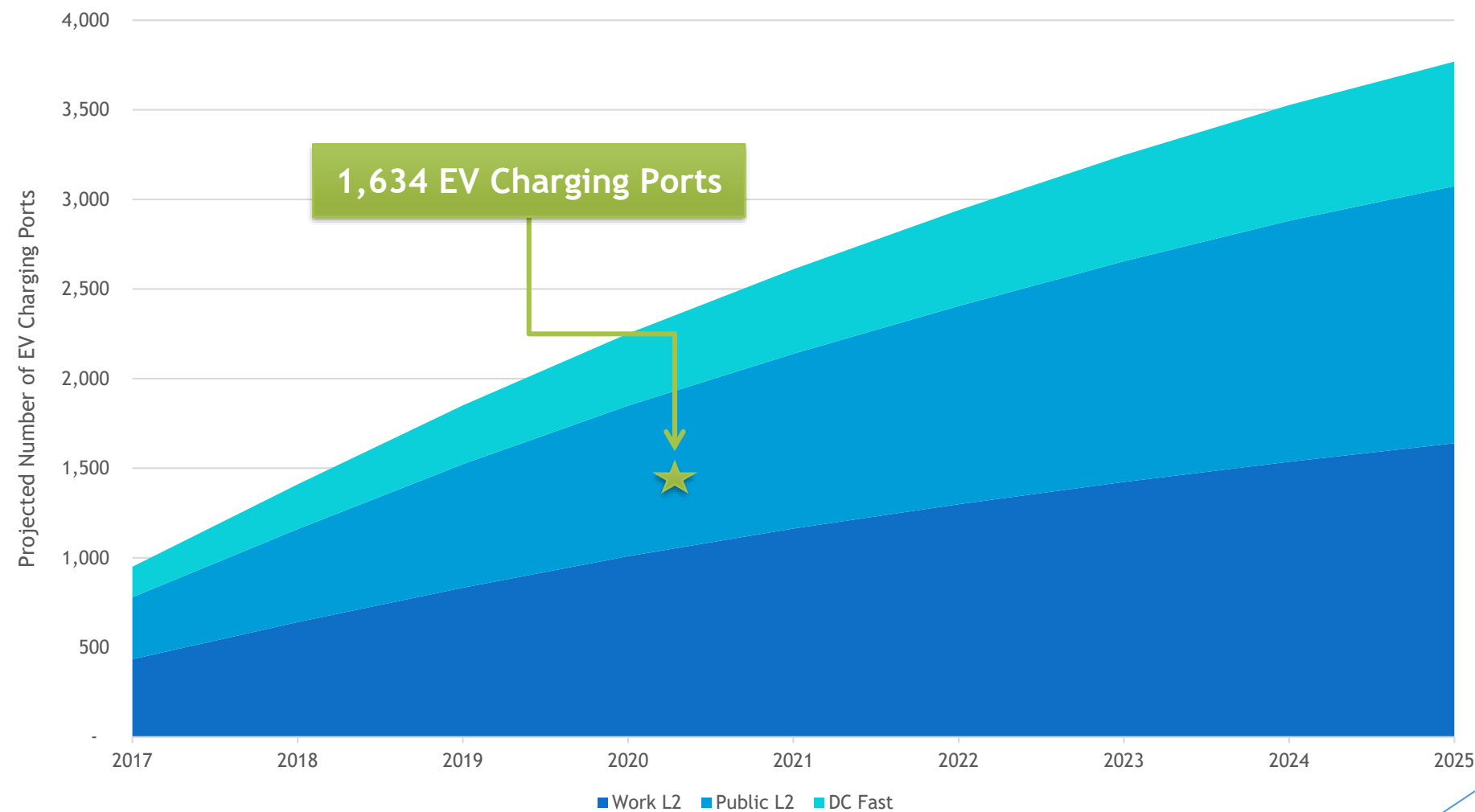
Data Source: DMV Registrations (2019)

Bay Area Public EV Charging Infrastructure



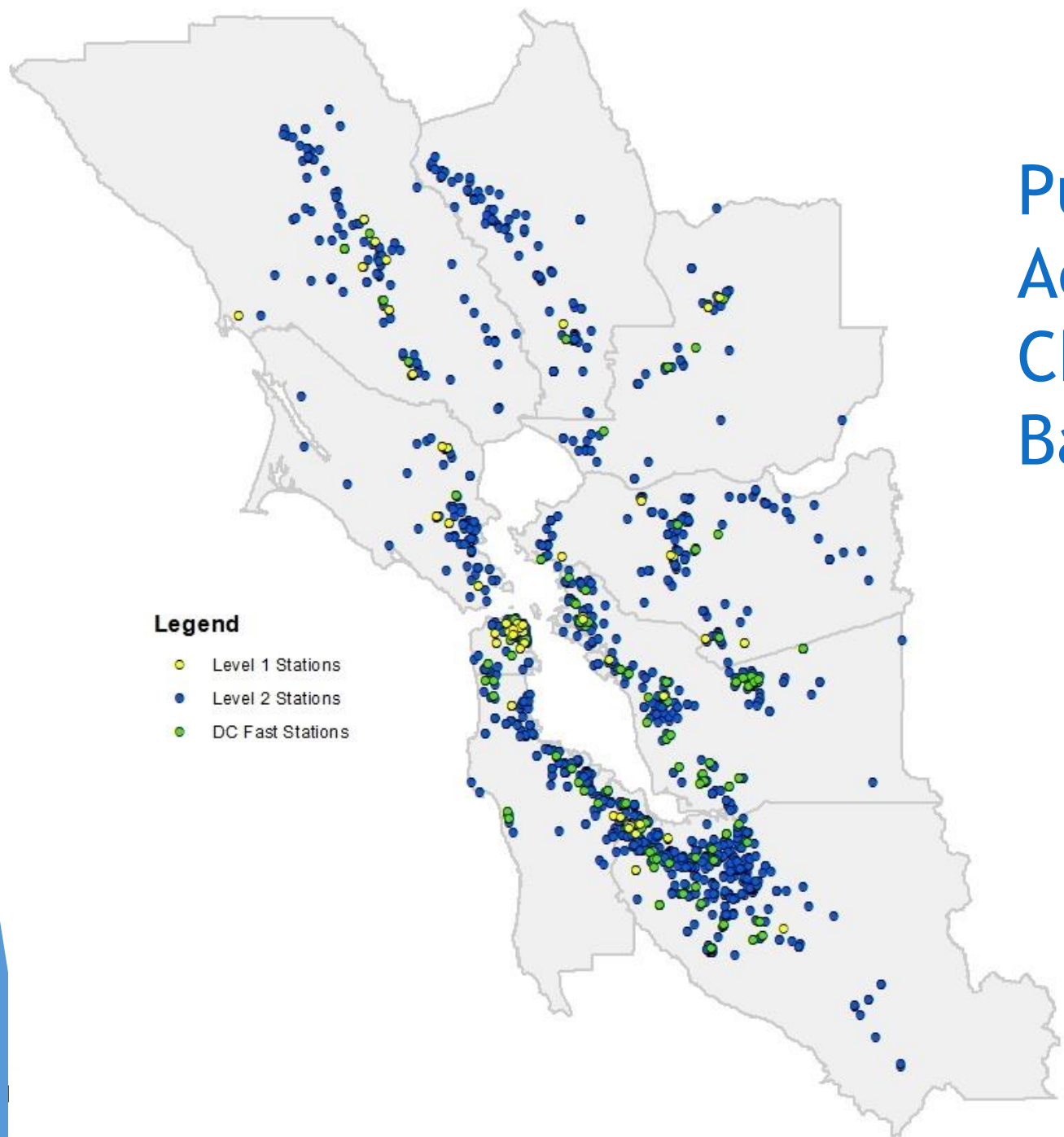
Source: Alternative Fuels Data Center CEC/NREL EVI-Pro projections, Alternative Fuels Data Center

San Mateo County Public EV Charging Infrastructure



Source: Alternative Fuels Data Center CEC/NREL EVI-Pro projections, Alternative Fuels Data Center

Publicly Accessible EV Charging in the Bay Area



San Mateo County



Publicly Accessible EV Charging in San Mateo County

Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), swisstopo, © OpenStreetMap contributors, and the GIS User Community



Outreach and Strategy Work

1. EV Coordinating Council
2. EV Market Research and Surveys
3. Grant Program Outreach

The Bay Area EV Coordinating Council

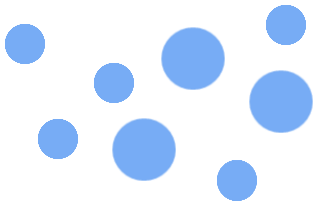
- Established in 2011
- Over 300 members from government entities, EVSE companies, OEMs, transit authorities, PG&E, CCAs, CBOs, etc.
- Serves as a venue for members to discuss emerging market trends and to share information and best practices from their experiences in their communities



EV Market Research Study

- Understand majority adopters to move market beyond early adopters: **apartment residents, low-income households, fleet managers, ride hailing drivers, property owners, and dealership sales personnel.**
- Understand priorities and barriers of key market actors that affect EV market and infrastructure

Anecdotes



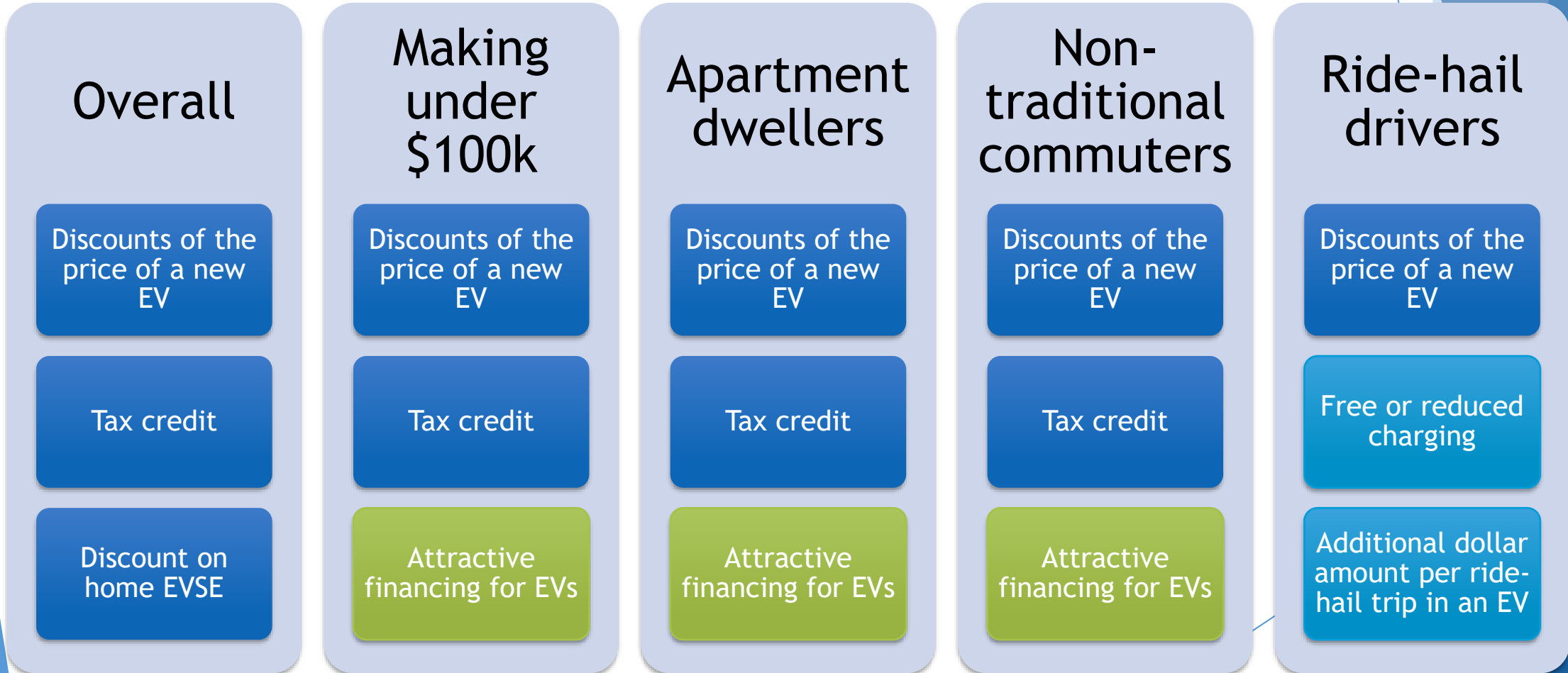
Data



Outreach
Messages



Influential Incentives



Air District EV Grant Programs



CLEAN CARS FOR
ALL



CHARGE!



HIGH MILEAGE
FLEETS



Thank You!

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